SupaDESK Mobile User Manual

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Contents

About SupaDESK Mobile 3
System Requirements 3
User Access 4
Main Screen 5
Help Icon 6
Incident Listing 7
Changes Listing 8
Tasks Listing 9
Searching 10
Basic Search 10
Advanced Search 11
Creating Incidents 12
Changing Status 13
Reassigning 15
Assign Me 17
Detail Screen 18
Details option 18
Notes option 19
Docs option 21
Basic Settings 22
Advanced Settings 23
Customizing SupaDESK Mobile 23

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1. About SupaDESK Mobile

The SupaDESK Mobile app provides a quick and easy way to manage your assigned incidents, changes and tasks (referred to collectively as tickets) in real-time from a mobile device.

Your existing SupaTOOLS account login is used to access data in real-time using an HTTPS connection to the SupaTOOLS server. A separately generated token is used to authentication against SupaTOOLS and does not use or require entry of your password.

The authentication token is generated by an Administrator in SupaTOOLS and e-mailed to you in the form of a clickable URL that will initialise the SupaDESK Mobile app. This token includes an expiry date which means a new token may need to be generated and sent from time to time.

The SupaDESK Mobile application includes a built-in demo token that can be used to view all features of the application. Write functions are however disabled when using the demo token.

SupaDESK Mobile has been designed with a very flexible interface that can be altered at the back-end to provide a customized list of tickets. This guide is based on the default configuration, which is to list tickets that are assigned to the user.

The core functionality of the current version allows you to:

- Switch between 3 pre-defined ticket lists
- Perform searching within ticket lists
- Change the status of a ticket
- Create an incident
- Assign yourself to an unassigned ticket
- Reassign a ticket to someone else
- View and add notes to a ticket
- View full details of a ticket and associated records
- List and download ticket attachments
- Approve/Reject Change Requests

2. System Requirements

To use the SupaDESK Mobile application against your SupaTOOLS database the following is required:

- License for SupaDESK Mobile application (authentication key generated per user)
- License for the SupaDESK module
- HTTP or HTTPS access to /request.php URI on the SupaTOOLS web server
- Database schema 20150714 or higher

To create incidents from SupaDESK Mobile, an incident template must be configured under Tools & Utils > System Settings > Incidents tab in your SupaTOOLS database.

An Android or iOS handset is required. Most modern mobile smartphones are supported.

SupaDESK Mobile can also be used on a tablet, however will maintain mobile screen size proportions.

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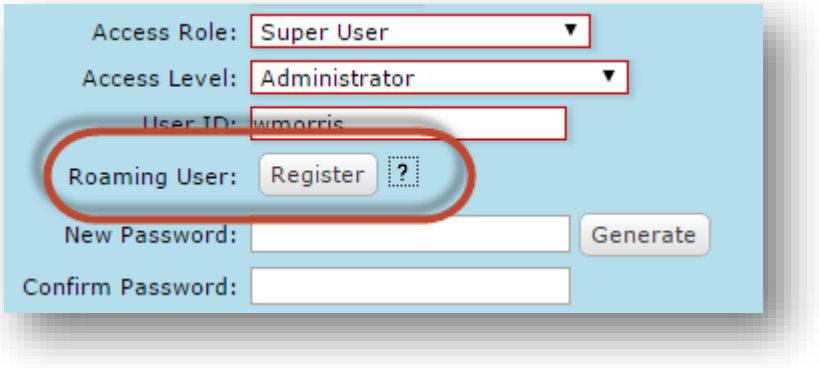
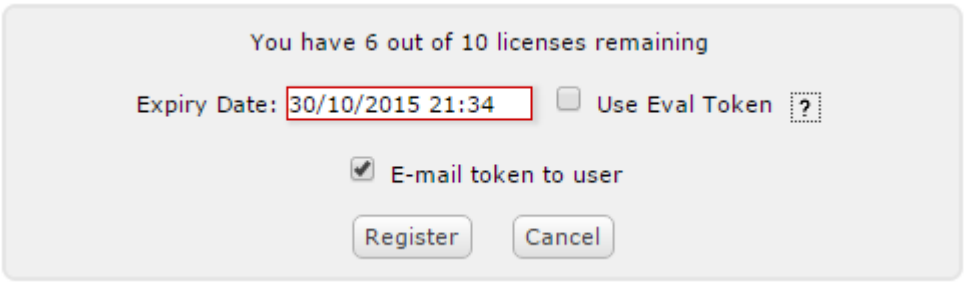
3. User Access

Each user must be supplied with an authentication token in order to use SupaDESK Mobile. The authentication token is generated within the SupaTOOLS application for each user by an Administrator, and sent via e-mail to the target user. User registration is achieved using the Roaming User "Register" button in the security section of the user details, as shown:



The token is unique per user and includes an expiry date for security purposes.



SupaTOOLS comes with one complimentary SupaDESK Mobile license. You can also create up to 10 evaluation license keys with the "**Use Eval Token**" option which will expire after 48 hours.

If the "**E-mail token to user**" is unchecked the security token will be displayed on screen. This is only for direct API use and not intended for SupaDESK Mobile.

The e-mail sent to the user contains the following content:

> Hi Fred,
>
> This e-mail is to confirm that you are now registered to use SupaTOOLS mobile apps!
>
> Click on the following link on your mobile device to activate access after installing the app:
>
> Click here to activate
>
> If link does not work check you have the required network access to your SupaTOOLS server from your device.

When the user clicks on the link on their mobile device the SupaDESK Mobile app will launch and initialise access to the server. The Tools & Utils > **Active Users** function can be used to list SupaDESK Mobile users and renew expired tokens.

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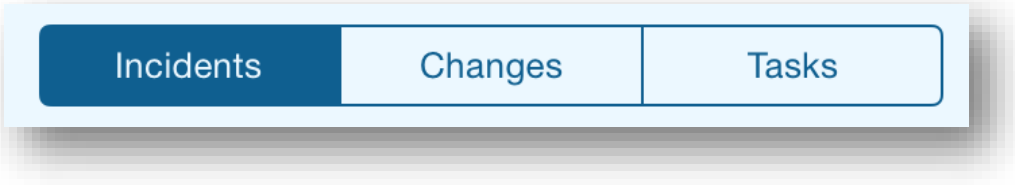
4. Main Screen

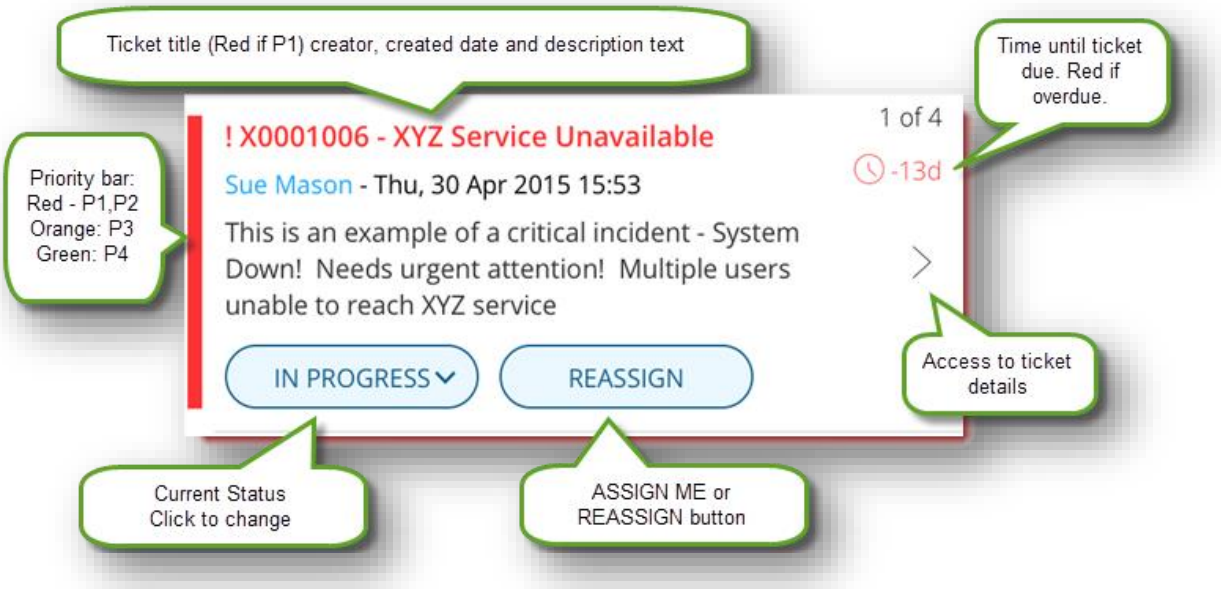
The main screen provides access to the 3 primary lists of tickets, which are divided into the sections **Incidents**, **Changes** and **Tasks**. The default listing is Incidents which can be altered under Basic Settings.



Touching the one of the options will switch between lists.

The header section provides access to the Basic Settings function, home page and user info popup. Clicking on the SupaDESK logo at any time will return you to the default listing screen.

Each ticket listed regardless of type provides a similar display:


Ticket title (Red if P1) creator, created date and description text
Time until ticket due. Red if overdue.
Priority bar: Red - P1,P2 Orange: P3 Green: P4
! X0001006 - XYZ Service Unavailable
1 of 4
Sue Mason - Thu, 30 Apr 2015 15:53
-13d
This is an example of a critical incident - System Down! Needs urgent attention! Multiple users unable to reach XYZ service
IN PROGRESS
REASSIGN
Access to ticket details
Current Status Click to change
ASSIGN ME or REASSIGN button

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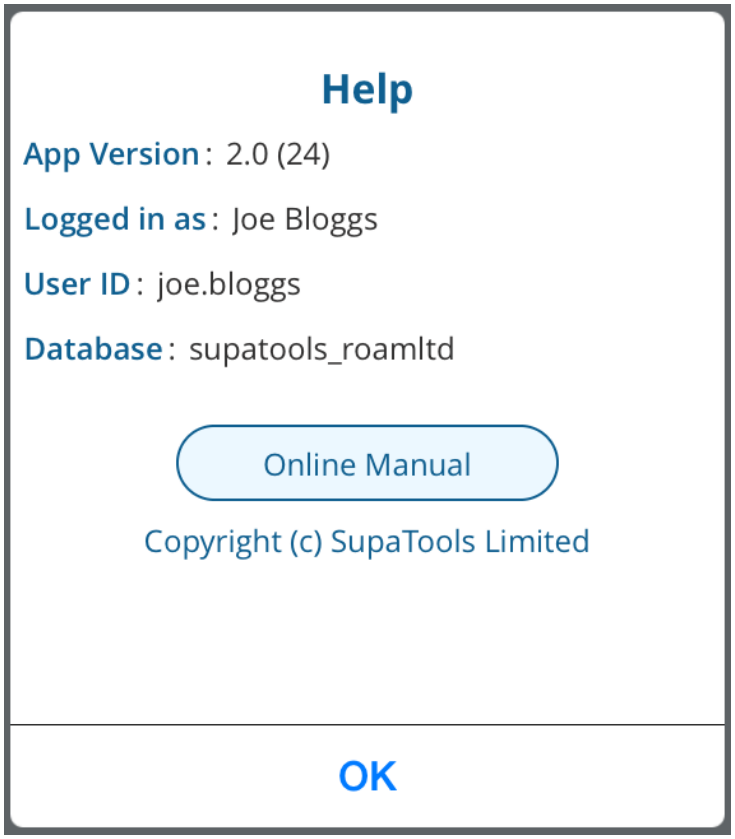
Help Icon

The Help function can be accessed via the question mark circle icon in the top-right corner of the main screen.

This window displays:

- Current version of SupaDESK Mobile
- Full name of logged in user
- User ID of logged in user
- Name of SupaTOOLS database

Access to online version of this manual is also provided.



Incident Listing

The **Incidents** list shows incident & request records according one of 3 views:

- Assigned to me (default) – Open unresolved incidents that have been assigned to your group and/or you personally
- Created by me – Incidents that have been created by you
- All Open – All incidents that are currently open

The chosen View may be altered using the Basic Settings function.

The current status of the incident is shown, and may be altered by clicking the button.

If the incident is unassigned, the ASSIGN ME option is diplayed, otherwise REASSIGN will allow the user to change the assignment to someone else.

Results are ordered by priority (critical to low) and due date (oldest first).

Clicking on the item will open the details of the Incident.

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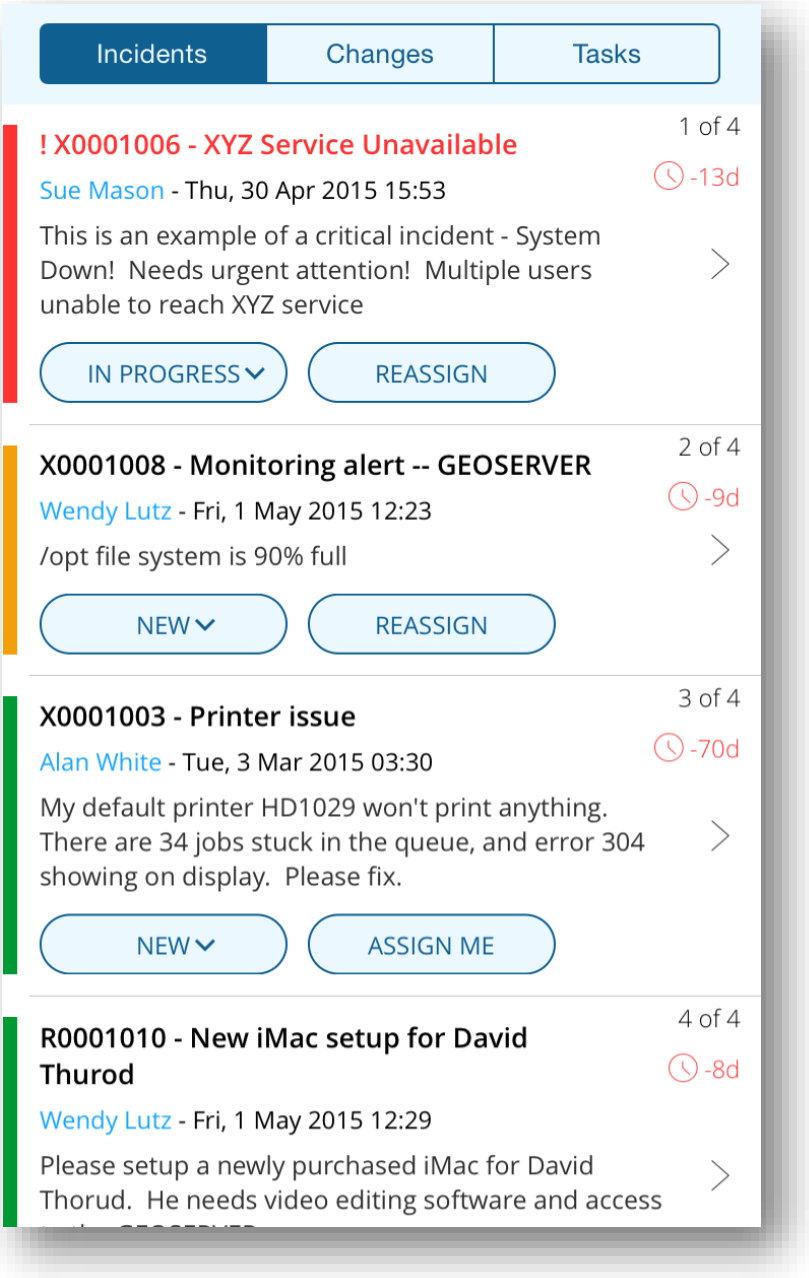
Incidents
Changes
Tasks
1 of 4
! X0001006 - XYZ Service Unavailable
-13d
Sue Mason - Thu, 30 Apr 2015 15:53
This is an example of a critical incident - System Down! Needs urgent attention! Multiple users unable to reach XYZ service
IN PROGRESS
REASSIGN
2 of 4
X0001008 - Monitoring alert -- GEOSERVER
-9d
Wendy Lutz - Fri, 1 May 2015 12:23
/opt file system is 90% full
NEW
REASSIGN
3 of 4
X0001003 - Printer issue
-70d
Alan White - Tue, 3 Mar 2015 03:30
My default printer HD1029 won't print anything. There are 34 jobs stuck in the queue, and error 304 showing on display. Please fix.
NEW
ASSIGN ME
4 of 4
R0001010 - New iMac setup for David Thurod
-8d
Wendy Lutz - Fri, 1 May 2015 12:29
Please setup a newly purchased iMac for David Thorud. He needs video editing software and access

Changes Listing

The **Changes** list shows Request for Change (RfC) records according one of 3 views:

- Assigned to me (default) – Open approved changes that have been assigned to your group and/or you personally
- Created by me – Changes that have been created by you
- All Approved – All open approved changes

The chosen View may be altered using the Basic Settings function.

The current status of the Change Request is shown, and may be altered by clicking the button.

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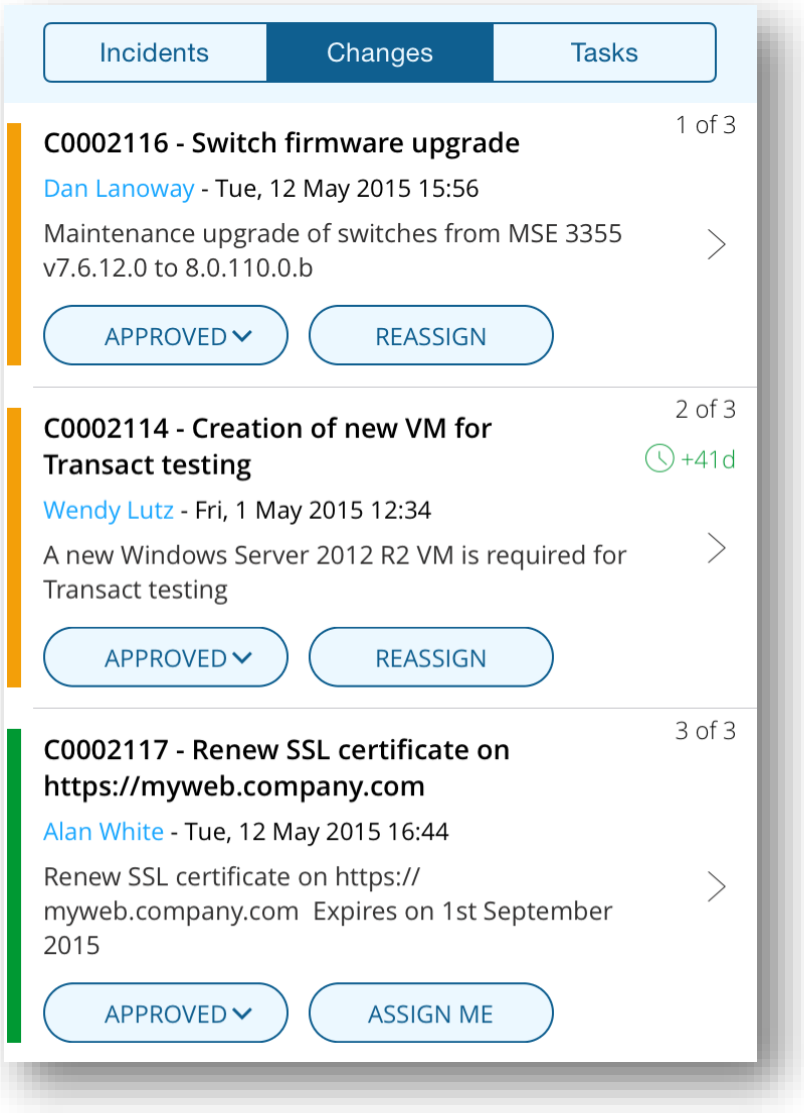
If the Change Request is unassigned, the ASSIGN ME option is diplayed, otherwise REASSIGN will allow the user to change the assignment to someone else.

Results are ordered by priority (critical to low) and due date (oldest first).

Clicking on the item will open the details of the Change Request.


Incidents
Changes
Tasks
1 of 3
C0002116 - Switch firmware upgrade
Dan Lanoway - Tue, 12 May 2015 15:56
Maintenance upgrade of switches from MSE 3355 v7.6.12.0 to 8.0.110.0.b
APPROVED
REASSIGN
2 of 3
C0002114 - Creation of new VM for Transact testing
+41d
Wendy Lutz - Fri, 1 May 2015 12:34
A new Windows Server 2012 R2 VM is required for Transact testing
APPROVED
REASSIGN
3 of 3
C0002117 - Renew SSL certificate on https://myweb.company.com
Alan White - Tue, 12 May 2015 16:44
Renew SSL certificate on https://myweb.company.com Expires on 1st September 2015
APPROVED
ASSIGN ME

Tasks Listing

The **Tasks** list shows task records according one of 3 views:

- Assigned to me (default) – Open released tasks that have been assigned to your group and/or you personally
- Created by me – Tasks that have been created by you
- All Released – All released tasks that are currently open

The chosen View may be altered using the Basic Settings function.

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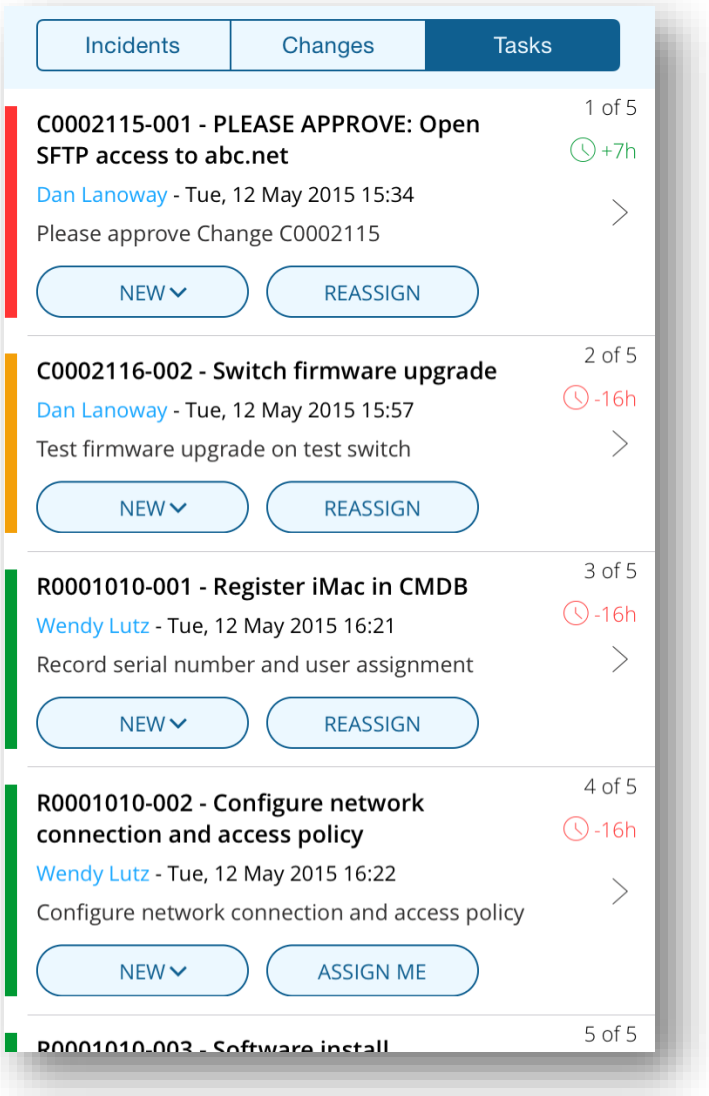
The Tasks option lists open Tasks that have been assigned to you or your group. Both Incident and Change related Tasks are included.

The current status of the Task is shown, and may be altered by clicking the button.

If the Task is unassigned, the ASSIGN ME option is diplayed, otherwise REASSIGN will allow the user to change the assignment to someone else.

Results are ordered by priority (critical to low) and due date (oldest first).

Clicking on the item will open the details of the Task.



Searching

Searching can be performed by entering a partial ticket number (Basic Search) or by entering values for one or more ticket fields using the Advanced Search function.

Basic Search

Basic Search is accessible directly from the main ticket listing screen as shown:

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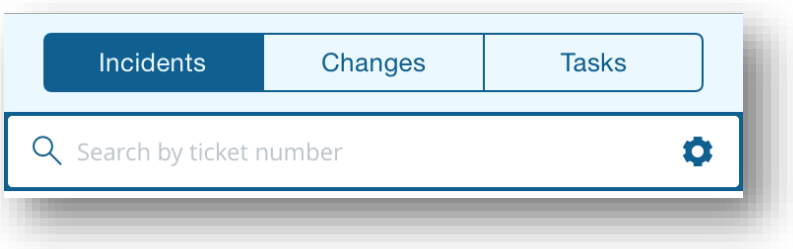
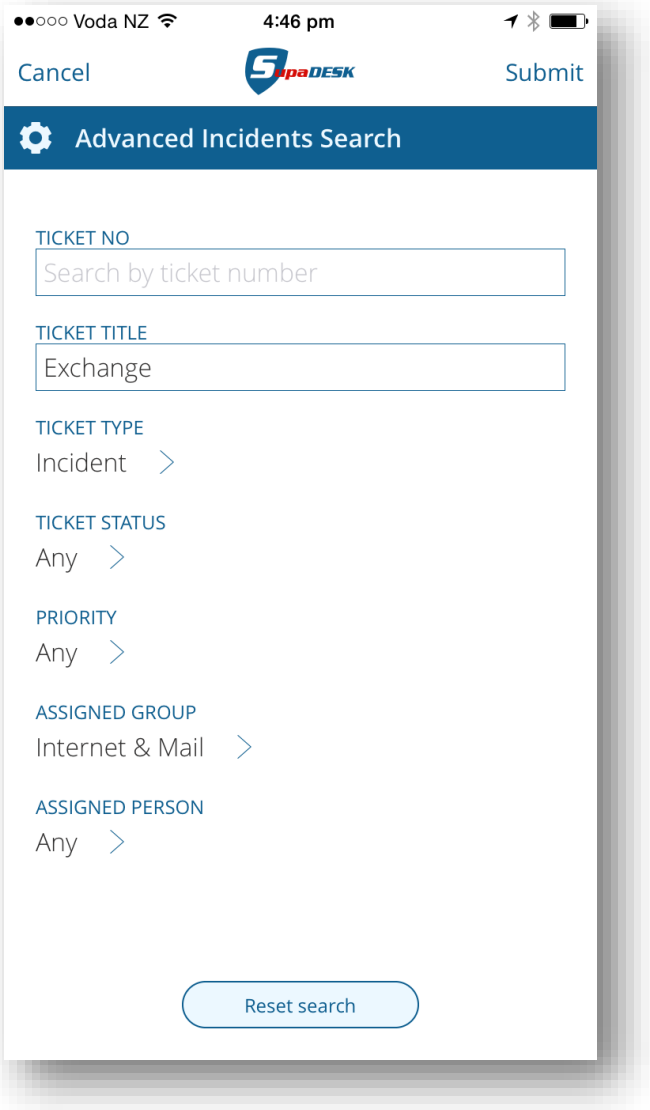


The Basic Search filters the current list by ticket number. A partial ticket number can be entered.

To search more than the ticket number field, use Advanced Search by clicking on the gear icon in the search bar.

Advanced Search

Clicking on the gear icon provides acces to the **Advanced Search** function where multiple criteria can be entered:



Both Basic and Advanced Search criteria are applied to the current list View.

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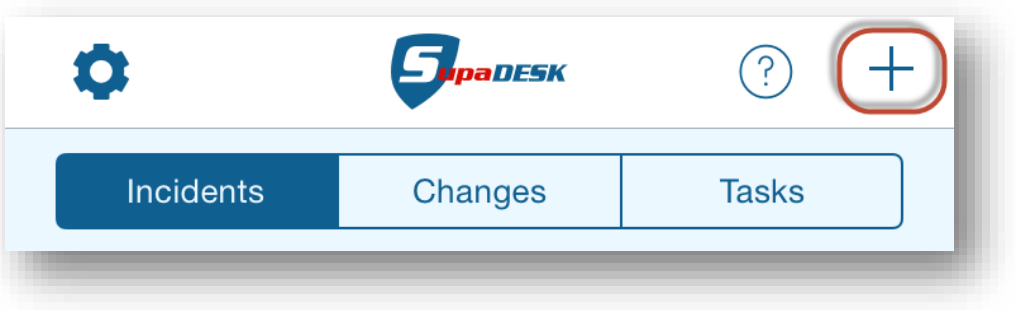
Creating Incidents

When then Incidents listing is selected the option to create an incident is available via the plus sign icon in the top-right corner of the screen.



This will lead you to a new screen where the basic detail of the incident can be entered.

The following fields may be specified for a new incident:

- Title (mandatory)
- Description (mandatory
- Priority (default Low)
- Assigned Group (default unassigned)
- Assigned Person (default unassigned)

The incident is created according to the defined Template in SupaTOOLS under System Settings > Incidents tab. All unset field values are inherited from the Template.

The incident number is generated and displayed once the incident has been created. e.g.

New incident created with number X0002033

Depending on the incident View selected, the new incident may appear on the main screen list.

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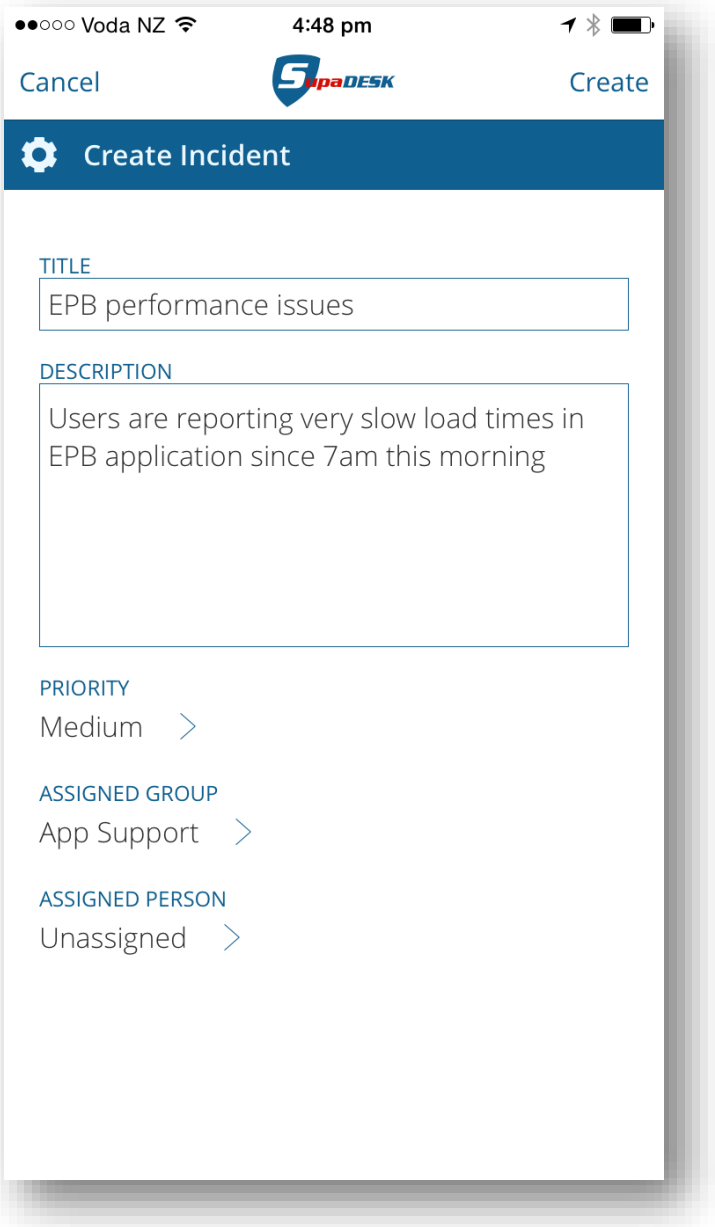
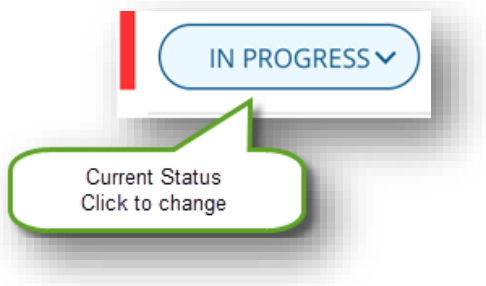


Changing Status

Clicking on the status button allows the ticket status to be changed. The available statuses depend on the ticket type and current status value.



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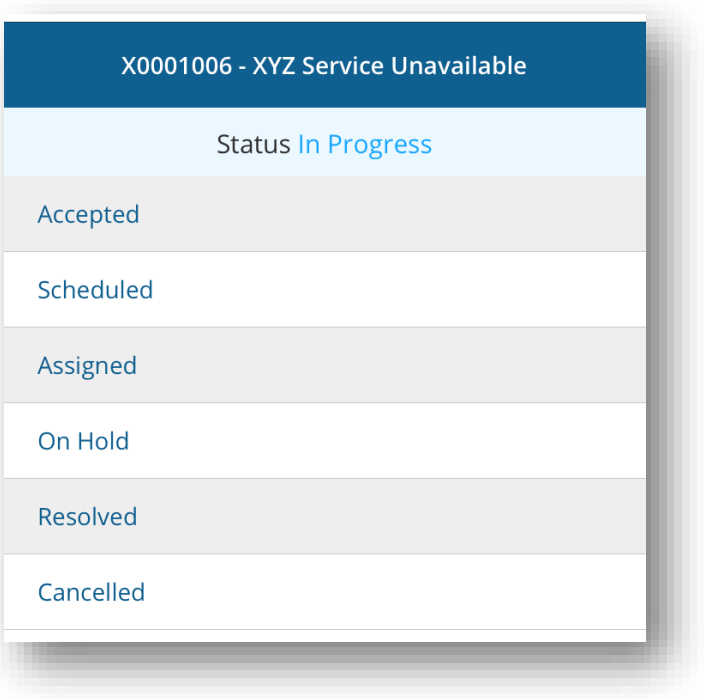
Click on alternate status to change the value.



Certain statuses require a reason to be entered. In this scenerio you will be prompted to enter some text before the status can be saved.

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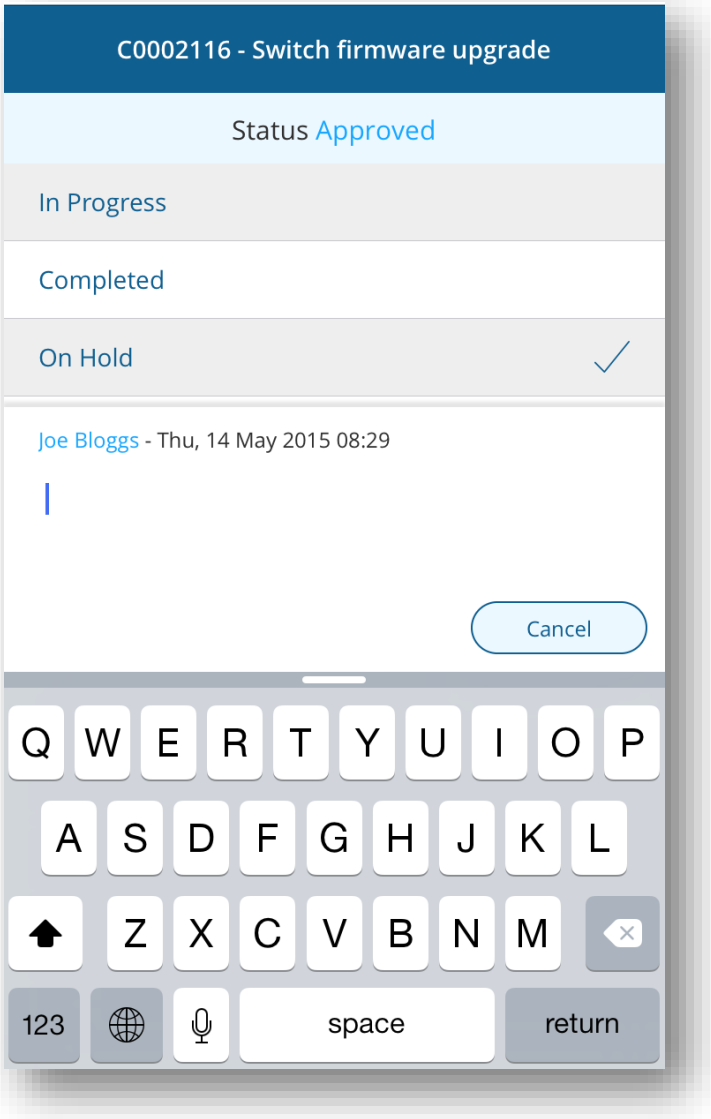

The Done option will appear in the top-right corner when the status can be saved.

Reassigning

If the current ticket has been assigned to you, you will have the option to reassign the ticket to someone else by clicking on the REASSIGN button.

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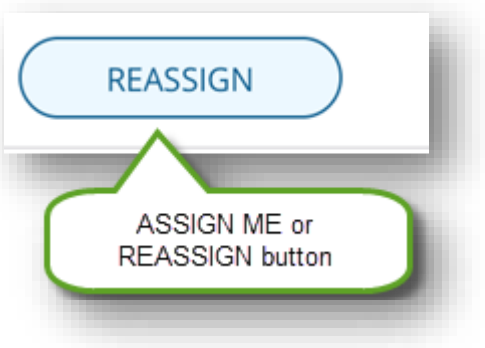

Clicking the REASSIGN button will reveal a list of other users within the currently assigned group, or if the ticket has not been assigned to a group a list of available support groups will be displayed.

The ticket may optionally be left unassigned, by selecting the UNASSIGNED option. Or, you can switch to a different support group by clicking on the Groups arrow.

The support groups listing displays a list of available groups. Clicking on a group will reveal its members. Selecting a member will set both the Assigned Group and Assigned Person of the ticket.

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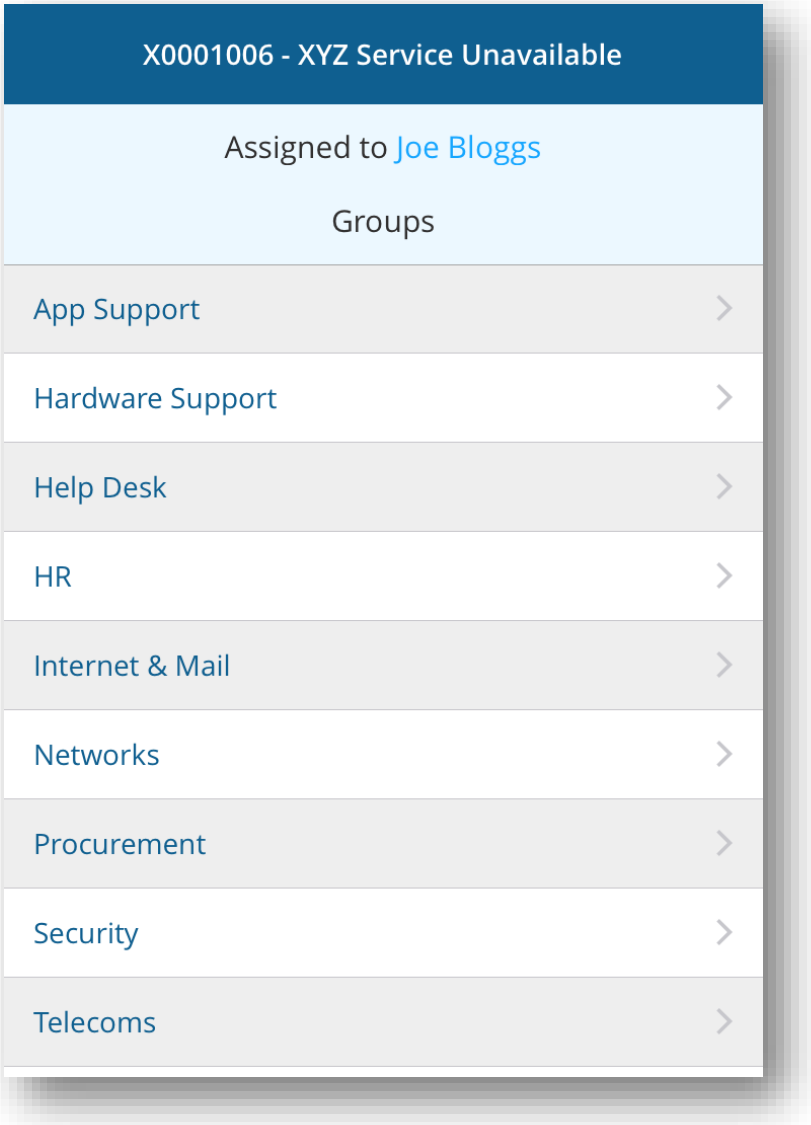
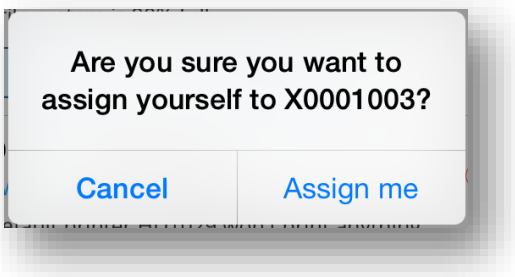


Assign Me

In the event the displayed ticket has been assigned to a group only, the ASSIGN ME button will be presented. Clicking on this button will prompt the user before setting the Assigned Person to the currently logged in user.



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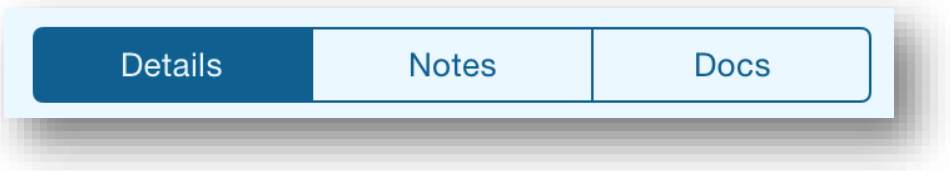
5. Detail Screen

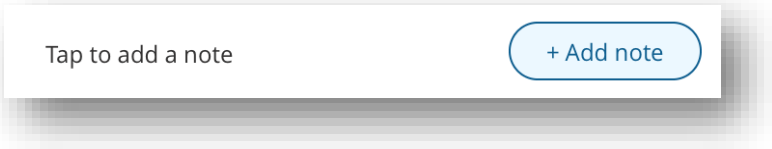
Clicking on any ticket entry in the Main screen will open the Details Screen for the selected ticket.

Here the user may switch between Details, Notes and Docs options.



Details lists the attributes of the ticket, Notes lists the notes entries, and Docs lists any document attachments linked to the ticket.

A note may be entered against the ticket from any one of the 3 options from the bottom of the screen.



Details option

The details option shows the attributes of the selected ticket according to the type of ticket and the definition of the $SDA_DETAIL attribute scheme defined in the SupaTOOLS database.

This display will typically be the same set of attributes the user would see if editing the ticket using the SupaTOOLS Web UI.

Any attribute value shown in blue can be clicked on to reveal the Detail screen for that item. This provides the ability to drill-down countless levels to explore ticket detail and relationships. The Back option can be used to scroll back to the starting position, or clicking on the SupaDESK logo will also reset the display to the starting list on the Main screen.

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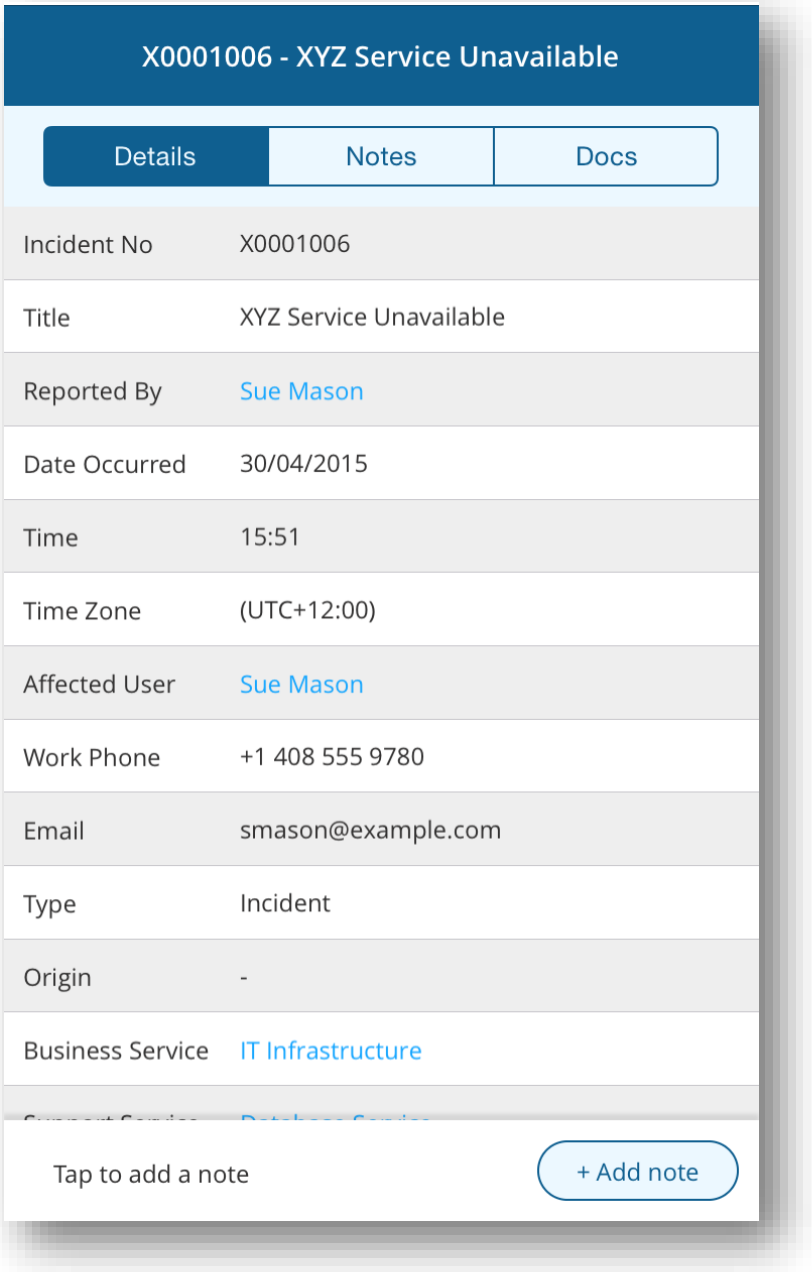

Notes option

The Notes option lists all notes for the selected ticket, latest first. The author and created date are displayed, along with the note content.

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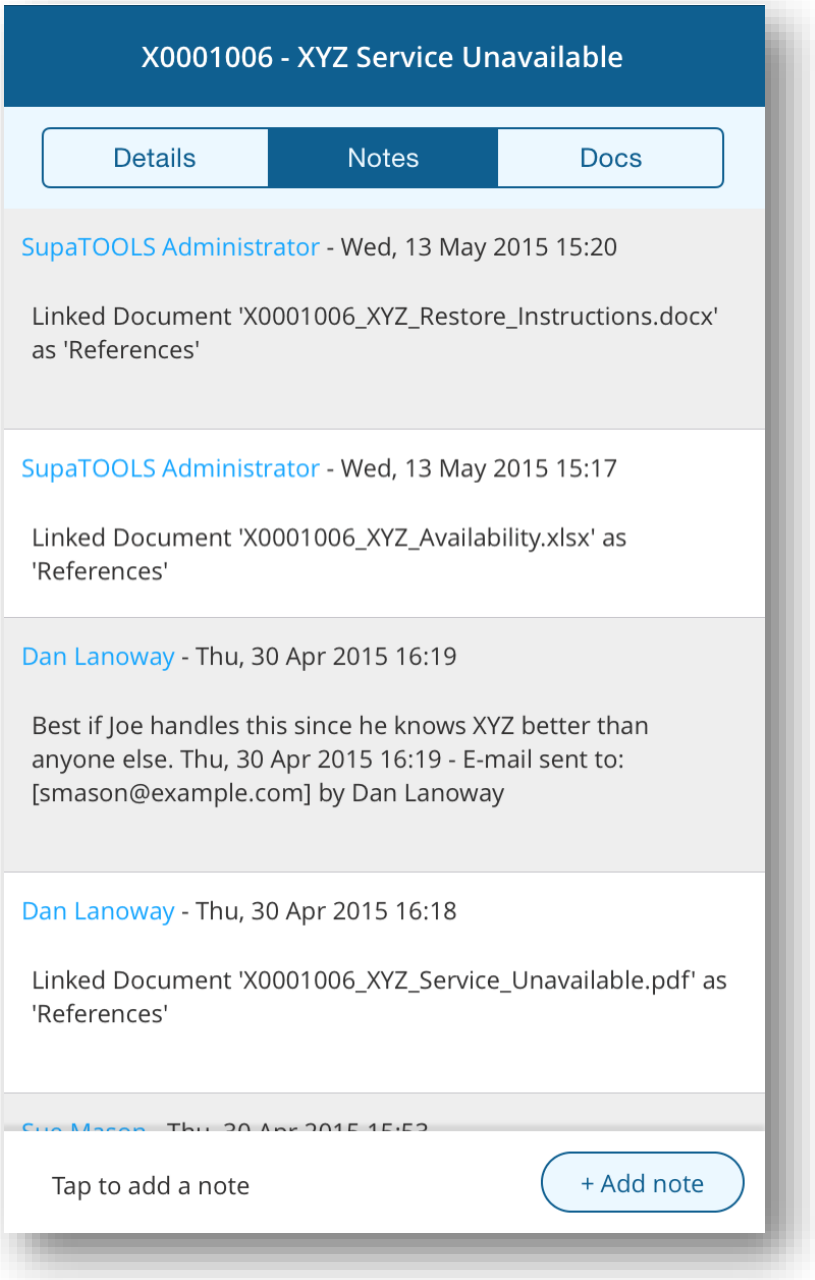
X0001006 - XYZ Service Unavailable
Details
Notes
Docs
SupaTOOLS Administrator - Wed, 13 May 2015 15:20
Linked Document 'X0001006_XYZ_Restore_Instructions.docx' as 'References'
SupaTOOLS Administrator - Wed, 13 May 2015 15:17
Linked Document 'X0001006_XYZ_Availability.xlsx' as 'References'
Dan Lanoway - Thu, 30 Apr 2015 16:19
Best if Joe handles this since he knows XYZ better than anyone else. Thu, 30 Apr 2015 16:19 - E-mail sent to: [smason@example.com] by Dan Lanoway
Dan Lanoway - Thu, 30 Apr 2015 16:18
Linked Document 'X0001006_XYZ_Service_Unavailable.pdf' as 'References'
Tap to add a note
+ Add note

Notes you have created can be deleted by swiping the entry to the left to reveal the Delete option.

Attempting to delete a note you did not originally create will result in a “Permission Denied” error.

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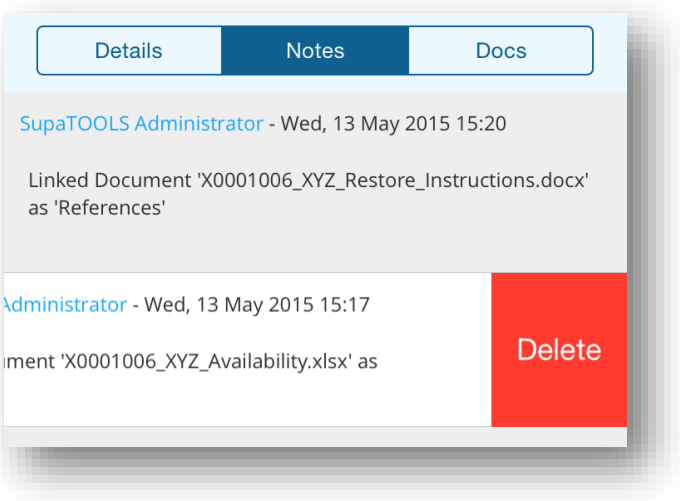
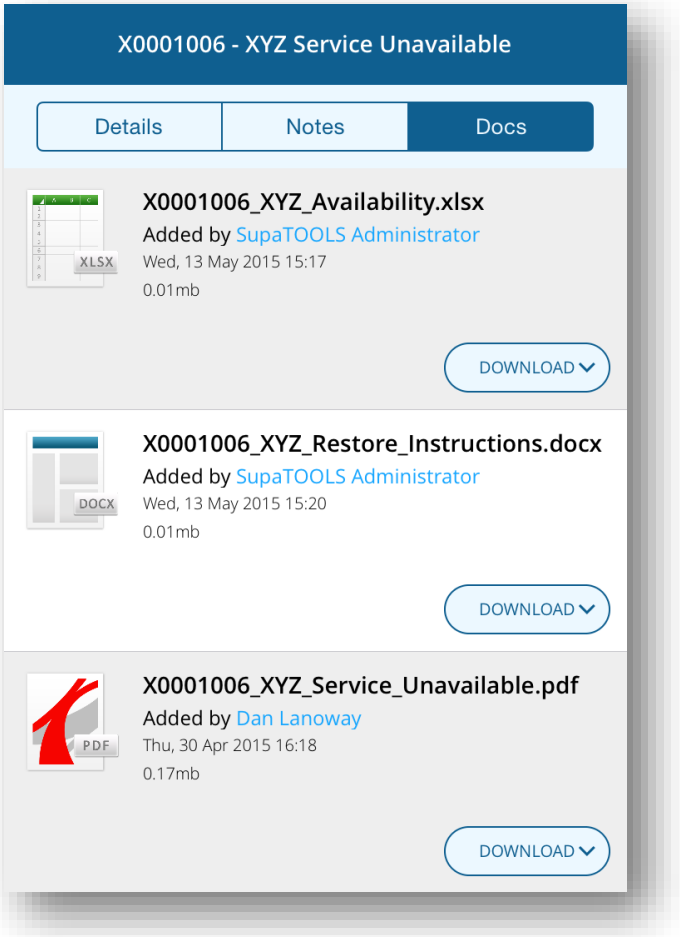


Docs option

The Docs option lists all documents attached to the ticket. Each document may be downloaded and viewed by clicking on the DOWNLOAD button.



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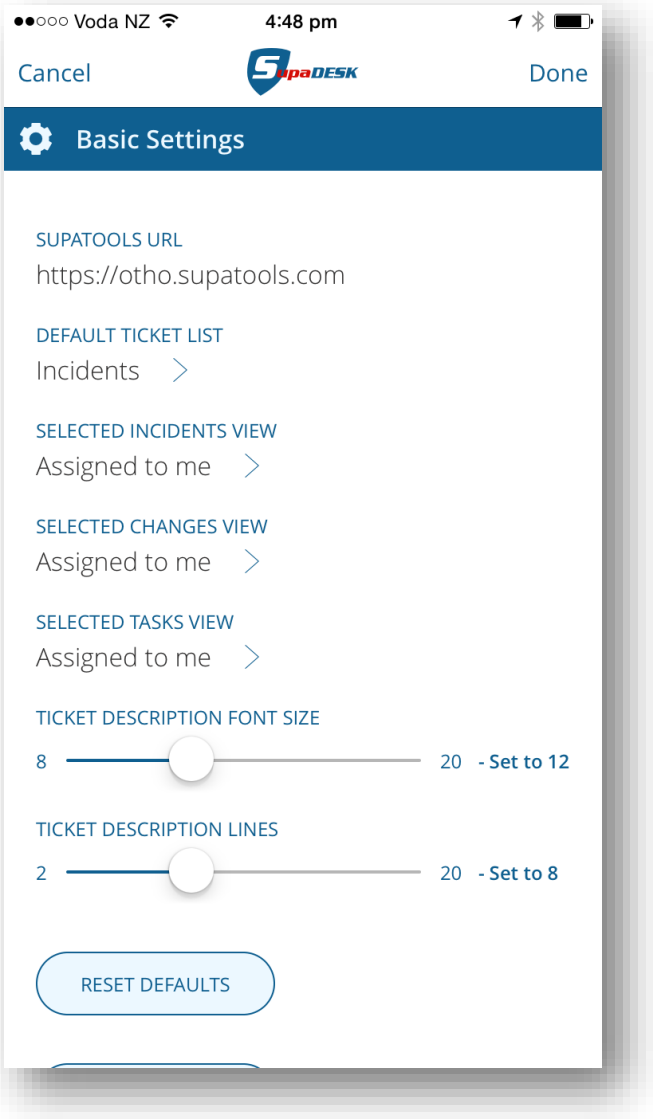
6. Basic Settings

The basic settings screen can be accessed via the gear icon at the top-left of screen, and allows you to:

- Set the SupaTOOLS URL
- Set the default ticket list on the Main screen
- Switch the view used for each ticket list
- Set the description text font size
- Set number of description lines displayed on the Main screen
- Manually log out

The RESET DEFAULTS option will reset all values back to factory settings. This includes reverting the login details to the demo account.



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7. Advanced Settings

The Advanced Settings option is reserved for use by SupaTOOLS support and requires a PIN number to access. Behind here it is possible to alter the SupaTOOLS views that are invoked to return data to the Main screen, thus customizing how the application presents data.

8. Customizing SupaDESK Mobile

It is possible to customize the output produced in SupaDESK Mobile for any of the preset Views and the attributes returned when viewing the Detail of a record. This is achieved by configuring SupaTOOLS at the back-end.

Views have been predefined to provide the list views as follows:

- $SDA_INCIDENTS_ASSIGNED
- $SDA_INCIDENTS_CREATED
- $SDA_INCIDENTS_ALL_OPEN
- $SDA_CHANGES_ALL_APPROVED
- $SDA_CHANGES_ASSIGNED
- $SDA_CHANGES_CREATED
- $SDA_TASKS_ALL_RELEASED
- $SDA_TASKS_ASSIGNED
- $SDA_TASKS_CREATED

The above Views can be modified to change the search criteria and output, but should only be performed by a SupaTOOLS consultant. Changing these views incorrectly may cause the SupaDESK Mobile to crash.

The attributes returned when a user views the Detail function is determined by the $SDA_DETAIL attribute scheme for the given record, according to its CI Type and Subtype.

Therefore it is possible to restrict or expand the attributes made available to the end user for different record types. If no $SDA_DETAIL attribute scheme is found the ‘default’ attribute scheme is used instead.

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